Electronic Labour Exchange Services
Literature Review

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Electronic Job Matching Services
Literature review

Research into the issue of skills and labour shortages have, in the past, often led to public policy reliance on training as the key and primary means of addressing labour imbalances. As this government embarks on a renewed interest in and analysis of British Columbia skills shortages in 2003 and in the future, it has identified a framework of broader adjustment mechanisms that it sees as necessary to bring balance to the labour market. This framework includes a range of employer-based practices and work organization options, as well as public policy considerations including, but not limited to, training. While issues of training and other sources of potential workers are important ones to consider, often concerns about the process of matching workers and available jobs remain unconsidered, yet they can play a strong role in creating an efficient labour market.

Several elements are in fact, critical to support an efficiently functioning labour market. These include:

- Strong macroeconomic growth;
- An adequate supply of workers;
- Workers with the right skill sets and competencies;
- Efficient matching of available workers with potential employers; and,
- A labour market that recognizes both monetary and non-monetary incentives

This paper will focus on the current knowledge base related to the fourth point: the efficient matching of available workers with potential employers – in particular, the use of technology in creating more efficient labour market transactions.

What are the benefits of more efficient matching of labour demand and supply?

There are two dimensions to the efficiency of job matching. The first dimension is the speed of the matching. If job seekers are able to find work more quickly, their duration of unemployment will be reduced, and the easier their transition back into the workforce will be. Employers also benefit from a faster matching process by seeing a reduction in the loss of production. The second dimension is the quality of the match. Again, job seekers will benefit, as the likelihood of

"bad" job placements will be reduced, thereby reducing job-hopping. For employers, the benefits of reduced employee turnover are significant, reducing their overall recruitment costs. In an April, 2002 report, the BC Chamber of Commerce indicated that there was a "lack of effective "signals" in the labour market". A clear understanding of labour market signals, and communication of those to both employers and job seekers is necessary in achieving balance in the labour market.

How efficient is B.C.'s labour market?

At the present time, there is no direct measure of the extent of job vacancies in British Columbia. Statistics Canada's estimates of job vacancy rates from the Workplace and Employee Survey peg the vacancy rate in B.C. at 1.9%[1], almost half that of Alberta. Applying this rate to current employment levels would suggest there are an estimated 37,000 vacancies, of which 17,000 are persistent. Direct surveys of employers by the Canadian Federation of Independent Business placed the number of vacancies among small and medium-sized employer at 17,000[2]. At this point, there are no regular, ongoing surveys of job vacancies that permit analysis of the trend, other than the Help Wanted Index. While the Help Wanted Index in B.C. has been declining over the past 3 years, general consensus is that HWI captures a shrinking pool of available vacancies, therefore may not portray current trends accurately.

Internet recruiting and Internet job search methods are increasing in popularity as technology and connectivity improves. An increasing proportion of advertised jobs are now posted online, however, the majority of jobs are still filled via traditional methods (e.g. word of mouth, newspaper advertising). The mechanisms for posting vacancies online include on-line classified ads; job search bulletin boards; industry-specific bulletin boards; and company web-sites. Navigating through the maze of job postings and on-line job boards can be complicated and time consuming for both employers and job seekers.

Currently, in B.C. links to many of the URL listings for job postings and on-line job boards have been consolidated through BC WorkInfonet (funded by AVED and HRDC), however, the job seeker is still faced with an array of over 100 websites when searching for "job matching services". The number increases if job posting services, job ads and job banks are included in the search.

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[1] Garlaneau, Diane, Krebs, Howard, Morissette, Rene and Xuelin Zhang, The Quest for Workers: A New Portrait of Job Vacancies in Canada, Statistics Canada's Evolving Workplace Series, October 2001

[2] Canadian Federation of Independent Business, Help Wanted: Update, April 2002

Most job boards are free to job seekers, but charge a fee to employers wishing to post job vacancies and/or have access to the resume database. Given the high costs involved, and the small number of job bank services that are true electronic labour exchanges with value-added services, most employers are still more likely to post vacancies on their own company website, rather than expand their candidate search methods.

A number of existing sites are sponsored by national, or international companies, which will often refer job seekers to jobs posted outside of British Columbia. Some sites have been developed as extensions of recruitment agencies, who will first take out the most qualified candidates, leaving potential employers access to only a portion of the original resumes. On the one hand, technology has increased the flow of information, but with few controls on quality of information, it appears to have complicated the job matching process. For a listing of some of the major job posting sites with British job postings, and the number of jobs lodged, see Appendix 1.

In Canada, the federal government continues to have a mandate *"to provide information on employment opportunities across Canada to help workers find suitable employment and help employers find suitable workers."* under the Employment Insurance Act. In some provinces that have negotiated provincial delivery of EI Part 2 services, the province assumes that mandate as specified in the EI Act. British Columbia, however, has a co-management agreement; meaning HRDC continues to have a delivery mandate and presence in this province with respect to job matching.

Many jurisdictions feel there is a role for government to play in simplifying the process of exchange between labour supply and demand. In jurisdictions where action has been taken, the intended objectives are:

- Decreased level of effort and time that job seekers remain unemployed
- Decreased level of effort and cost for employer recruitment, and decreased time that employers have unfilled vacancies
- Better quality match due to increased level and quality of information available to both job seekers and employers.

What does the academic literature have to say?

With the advent of technological improvements on the Internet, labour economists have speculated that there are potential benefits to the labour market. Some of the potential benefits that economists have identified include: greater

contact between job seekers/employers, lower costs, and greater information content provided up front. Overall, most economists agree that improvements in the job search process could help reduce frictional unemployment, increase the quality of the job match, and create truer wage differentials for skills and abilities.

Some academics have been following the advent of Internet recruitment services, and noted a proliferation of services, which potentially over-saturates the market, and creates too much information for the job seeker and recruiter. The counter-productive nature of too many uncoordinated sites has been confirmed in a recent study[3], which found that among US job seekers, after adjusting for personal characteristics and attributes, internet job search actually appeared to lengthen unemployment spells rather than shorten it. Many of the gains that internet job search providers can lay claim to, are in fact realized through pre-selection by job seekers with observed characteristics such as higher education levels, work experience in professional occupations, etc., and those with unobservable characteristics such as high motivation, good support networks.

These findings are consistent with the hypothesis that: use of internet jobs search and recruitment tools requires a high level of comfort and familiarity with computer systems, and since they are self-directed, also require a higher level of motivation and commitment. Furthermore, the large number of services available, while free for job seekers, nonetheless requires an ability to discern the differences between the options, and pick the one or two that would provide the most appropriate services. While no comparable studies have been done looking at employers, it is expected that some of the same findings would apply.

A second important dimension that has received some attention[4] is the fact that many of the large, commercial electronic recruiting sites which operate in B.C. and Canada are either wholly or partially owned by foreign interests, often large, foreign owned corporations. Smaller domestic firms, often due to the fee structures of these services, will use only the job posting capability of the services and are unable to afford enhancements such as direct searches of the on-line resume bank. While Internet recruiting in theory makes it easier for B.C. firms to find workers, it also makes it easier for foreign companies to find B.C. workers. Larger, multinational firms are better able than small businesses to absorb the additional costs of doing direct searches of several on-line resume banks, and therefore will be more likely to have access to young B.C. workers who have registered. Public policy is still grappling with the challenge of supporting and

[3] Kuhn, Peter, Skuterud, Mikal, Internet Job Search and Unemployment Duration, October, 2002.
[4] Nakamura, Alice, Pugh, Theresa, Internet Recruiting Policy Challenges, September, 2000.

encouraging worker mobility, while supporting local economic development, which requires maintaining a stock of available workers within a geographic region.

The advances in technology bring another new dimension into the labour market equation. Historically, job boards have tended to advertise the skill sets of those actively for work, and employers who have new jobs to fill. In addition to the millions of resumes posted on commercial sites, recruiters who have the technical skills are now able to access millions of more resumes and biographical information and tap into "passive applicants" for jobs. These are people who are not actively looking for another job, but would seriously consider an attractive offer. In fact, with little effort, but some technical "know-how", specific skills sets can be searched for within the websites of competitor companies who have posted staff bios. With these kinds of resources and know-how being exercised by technology savvy companies, small and medium sized employers without the technical background will be at a distinct disadvantage in their quest for new workers.

The combination of technical advances and the proliferation of online jobs sites mean that many recruiters are rethinking their approaches to finding workers. Due to the level of specialization of many online sites, there is no one site that fits the bill for all jobs within the company. Some corporate recruiters are finding this is also creating overload for job seekers, as they search for the best sites to post their resumes,

What is happening in other jurisdictions?

A number of other jurisdictions have seized on the opportunity to develop and offer services to employers aimed at improving the matching of job seekers with jobs. In almost all instances, the basic service is provided free of charge to employers and job seekers. In most cases, the basic electronic service is backed up by access to on-the-ground services – sometimes provided free, sometimes provided on a fee for service basis.

The common characteristic of the solutions developed in other jurisdictions is the early identification of employers as a important customer in developing labour market solutions, and ensuring that services pay as much care and attention to meeting the needs of employers, as they do for job seekers. Labour market policy in Canada over the past 2 decades has tended to focus more on sources of supply, and achieving labour market equilibrium by building the skill sets of new and existing workers. While this is important work to continue to build on, it does not integrate the considerations of the demand side of the labour market, and therefore will ultimately fall short of full labour market efficiency.

Other provinces/states

Saskatchewan

Saskatchewan is one of the provinces that is currently delivering employment services on behalf of the federal government under a devolution Labour Market Development Agreement. Part of that agreement includes assuming responsibility for the goals and objectives of the National Employment Service as specified in the EI Act and regulations. This service operates independent from the National Job Bank run by the federal government.

Saskatchewan has chosen to develop its own "home grown" electronic labour exchange that is more formally linked into its network of labour market and career information. From an operational perspective, the SaskNetWork has been marketed as the primary stop for those seeking career and labour market information, therefore, the development of a streamlined electronic job matching service is a natural fit.

This service has some ability for both job seekers and employers to specify what skills they have, and what skills they are looking for, in addition to narrowing the geographic search, educational requirements etc. It has the added benefit that it provides easy, one-stop access to Saskatchewan jobs first, creating a greater likelihood of matching unemployed Saskatchewan residents with Saskatchewan jobs.

Additional services have been included in the SaskNetWork over time. At the present time, this service includes forecast information, career planning information, referrals for information on financial assistance, links to education and training information. Labour Market information is developed and disseminated in partnership with HRDC, and is as detailed as possible in order to provide regional and occupation-specific information.

New Brunswick

New Brunswick recently launched a job posting service, made available to employers on a fee-for-service basis. This initiative was developed as part of the Investing in People Strategy that the New Brunswick government has been developing. The goals of this strategy are focused on keeping New Brunswick young people in the province, and bringing home those who have left the province, by demonstrating the presence of good jobs. The Premier of the province has championed this repatriation theme. The information on the site therefore also focuses on elements such as cost of

living comparisons, information of quality of life, and support systems such as the quality of education in the province.

This service is not an electronic labour exchange, but is, rather, a job posting service. Employers pay a modest fee, and are then able to post their vacancies on the electronic job board for a 60 day period. Employers are responsible for maintaining the content and accuracy of the posting. On the job seeker side, there is a registration component, which will allow registered users to be notified when jobs are posted within given specifications. The system was developed and operated by a New Brunswick information systems company.

Manitoba

Attracting workers to Manitoba has also been a priority that has been identified within internal planning documents, and supported by the Premier. Information on the benefits of moving to Manitoba, including job opportunities, are positioned front and center in the range of services available to the public. Good labour market information is seen as key to achieving those goals, and Manitoba has spent considerable effort developing an electronic window to labour market and career information. The province has its own WorkInfoNet, however, much of that information remains focused on the job seeker. In order to achieve the larger goal, a greater focus on employers, and connecting labour demand was necessary.

The province has developed the Virtual Employment Centre in order to meet this objective. This service connects information for both job seekers and employers. The province continues to rely on the federal government to maintain its National Job Bank postings for the province, therefore, has not developed its own service. The presence of a large number of private services has been a concern, and the province is currently assessing the feasibility of developing a meta-search tool, which would permit the user to do a single search of all major job-posting services.

Quebec

In 2001, as part of the responsibilities the province assumed under its Labour Market Development Agreement, the province of Quebec developed its own online job matching service. This service is operated by Emploi-Québec, and operates independent from the National Job Bank services delivered by HRDC.

In order to assist employers and job seekers with concerns about using technology, the province has developed a number of "how-to" guides, which walk the user through the system, as well as identify the benefits of using the provincially sponsored Internet recruiting tool. A network of 17 regional branch offices supports services for both employers and job seekers for those who may require additional assistance, or prefer in-person service. The electronic service also contains links to relevant labour market information, including future job prospects and analysis of the labour market.

Outside Canada

Australia

In early 1996, the Australian government was in a position to move its government sponsored job board from a paper-based system, to an electronic platform. At the time, the goal of this new system was to improve access by job seekers to the range of job vacancies that were lodged with the Commonwealth Employment Service. Due to the goals of improving accessibility to current job vacancy information, the Department also invested in more than 2000 touch-screen kiosks, which replaced the paper-based Job Boards. This had the added benefit of freeing up the time of employment counselors to do more intensive work with job seekers.

As the government proceeded in 1998 with significant reforms to the employment services, Job Matching Services were developed, and enhancements were made to the Electronic Job Board, allowing users to access the service from the Internet. In its current form, the Australian Job Bank offers a true Electronic Labour Exchange, which provides the ability for users (both job seekers and employers) to engage in transactions, not just find information. In the current service delivery model, electronic services are supported and enhanced by storefront services delivered through Job Network, and also supported by a toll-free service for employers. At this point, the Australian government maintains ownership and responsibility for the Australian Job Bank, while employment services and income support services are delivered through Job Network and Centrelink respectively.

The success of this service has been dependent on its focus on meeting the needs of employers. Early on, the developers felt that the success would be linked to the quality of job postings, and the quality of the job match. Development of the service, therefore, focused on ensuring that job

postings did not become stale dated, and that the technology built in value-added functions such as online short listing.

United Kingdom

Employment services in the United Kingdom have been revamped under the New Deal initiatives developed by the Blair government. The Department of Work and Pensions has consolidated the income support and employment services government delivered under the new JobCentrePlus in order to provide streamlined support for those looking for work. Not all job seekers require income support, but the integrated delivery ensures that those who do have a more streamlined transition back into the workplace.

Through the JobCentrePlus, employers are able to post their job vacancies on the government-sponsored job posting service. Vacancies are currently posted by speaking with a staff person in the JobCentrePlus, however, the information is available online for job seekers to view – both on the Internet, and through a network of touch-screen kiosks. The government purchased these kiosks from the same vendor that supplied the Australian government.

In addition to the basic job posting service provided by JobCentrePlus, employers have access to additional recruitment services, including:

- Advice on recruitment methods and procedures;
- Information about availability of suitable applicants;
- Circulation of the vacancy locally, nationally, or internationally;
- Regular follow-up to ensure the service is meeting your needs;
- Advice on any difficulties in filling your vacancies;
- Advice on employing people with disabilities.

The government has also identified the need to have productive workplaces, where quality of life contributes to increased productivity and retention of employees. In order to meet these objectives, the Department of Trade and Industry also provides services to businesses aimed at providing employers with tools and incentives to invest in skill development, and engage in management practices that promote healthy, productive workplaces. These services provide a natural complement to the job placement services, as they help ensure that once job seekers are placed into employment that the jobs will last.

United States

In the U.S. there has been considerable attention paid to issues of skills shortages, and meeting future workforce needs both at the federal level and at the state level. At the national level, the US Department of Labor is responsible for maintaining America's Job Bank, and has also been instrumental in guiding the state-level developments of One-Stops, which provide integrated employment services. One of the advantages of these developments is that many of the One-Stop services are managed by County-level business coalitions. In the "best practice" examples that have emerged, it is this kind of relationship that has proven critical to connecting available workers to jobs, and providing relevance to workforce development programs. The success of many of these programs has also been due to sustained attention and focus on labour imbalance issues, which have only been maintained due to tight labour markets in most states.

At the state level, through the National Governors Association, skills shortage issues are being viewed through the lens of planning for workforce development. In 2002, one report indicated that one of the roles that governors could play in improving workforce systems, was to work with state and federal agencies, as well as business and labor groups to help people find the best job they could, and to help employers find the best employees to do the work they had. States are guided to helping broaden access to both information and services through partnerships. At the national level, the US Department of Labor formed a partnership with Monster.com in order to exchange job listings with America's Job Bank.

As recently as December 2002, state Governors were being provided with advice to consider subsidized labor market information as a key ingredient to developing a Human Capital System for a Knowledge economy. One of the bold policies they are being challenged to develop and implement within their states is the creation of a "Learn-ware" marketplace on the Internet, which would include:

- Labour market information
- Education and training information, including post-program placement rates and wages)
- Self-assessment tools
- Financial aid information
- Job search and matching
- Linkages to e-learning.

San-Diego

San-Diego County began developing an electronic job matching service to complement its network of One-Stop locations, which provide job search support and assistance to unemployed persons within San Diego County. Early on, they identified the importance of maintaining a bank of local jobs, and identified the importance of using technology to improve access to services.

Early in the process, the One-Stop board was able to shift gears, and ensure its efforts supported local economic development priorities. At the same, time, the need to maintain services for job seekers led to the development of online services and supports. One thing that sets this service apart from many other electronic career/hiring systems that are publicly funded is that it permits the users (both job seekers and recruiters) to transact business on-line, and has a network of storefront services that complement those delivered on-line. The development of this service was only possible with local champions and clear vision of the final product and it demonstrates that locally developed and locally focused services can provide value-added in the labour market.

Utah

In November 2002 the state of Utah launched its own on-line job-matching system. This system was developed to enable job seekers and employers to find each other. In addition to the development of a core, self-directed job matching system, this job bank also provides a variety of other employment services, and referrals to related supports such as childcare and relevant Labour Market Information. This system builds on the success of America's Job Bank and America's Talent Bank, which are sponsored by the US Department of Labor, but brings a state-level focus to meeting the needs of employers and job seekers. To support decision-making at the local level, Utah has also invested in a network of Workforce Information experts, who collect and disseminate information on labour and skills shortages, and monitor other labour market indicators such as wages and working conditions.

New Zealand

Throughout the 1990's New Zealand's employment and income support services were transformed significantly. Fiscal pressures, combined with persistent long-term unemployment among core groups in the population led to the development and testing of employability assessment tools and

the development of integrated income support and employment services. Following these developments, in the late 1990's the government embarked on a national level human resource planning exercise. This human resource plan, Workforce 2010, was released in 2001 and identified the need for New Zealand to ensure that all sources of labour supply were utilized fully, to continue to support economic growth and job opportunities for all who wanted work, and to focus on the matching between job seekers and employers.

This focus on matching led to more intensive research on the dynamics of the labour market, including the complexity of job search and recruitment. The importance of information and knowledge about labour market signals also emerged as a key knowledge gap, which the government is working to fill.

In line with the strategic priorities that the government identified, it has developed a Job Bank and a Talent Bank, that together provide a job-matching tool that is available free of charge to employers and job seekers. Job vacancies can be lodged on the Job Bank by phone, fax or e-mail, and the postings are then available online for job seekers. Additional recruitment services are also available for employers, including assistance with shortlisting, use of government facilities to conduct job interviews, assistance with writing job descriptions etc.

Within the last few years, economic conditions have been good in New Zealand, creating tight labour markets. Current priorities therefore, continue to build on improving the efficiency of matching workers with available jobs, and to identify early on which skills and competencies will be required by industry in order for individuals to make training decisions that support labour market needs.

What lessons can we learn?

- Online services should be developed with the client needs in mind, rather than the needs of government, and should be based on informed research about client needs (i.e. ask the job seekers and employers)
- Consolidate website offerings rather than creating new structures. Where possible, sites should be integrated, as a proliferation of websites potentially confuses the end-user.
- The business needs should drive the development of on-line services, rather than the technology.

- Coordination with other agencies and organizations in order to integrate services as fully as possible, but also to minimize development costs.
- New business models and frameworks will be required. Application of new technology to existing frameworks will not be sufficient. Other service delivery methods should also keep pace with the changes.
- Business clients are looking to complete transaction on-line, rather than merely finding information.
- Destinations and information must be easily found, and transactions completed easily.
- Some back-end processes and structures may need to be reengineered, but may result in higher payoff.
- There will always be a core client group who will not use on-line services.

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Appendix 1: Selected Private sector job sites and number of job vacancies lodged

				current postings		
Name	***sponsor/affiliate***	***Fees for job seekers***	***Fees for employers***	**February 17, 2003**	***industry focus?***	***geographic focus***
National Job Bank	Human Resources Development Canada	none	none	1,371		Component of a Canadian network
Workopolis	partnership of 3 media companies (Bell Globemedia, Toronto Star newspapers, Gesca Ltd.)	none	yes	1,368		Component of a Canadian network
Career Click	major daily newspapers	none	yes	1,485		Component of a Canadian network
Monster.ca	TMP Worldwide Inc.	none	yes	1,063		Component of an international network
JobShark		yes	yes	126		Component of an international network
Career Owl	non-profit, started by professors Ualberta	none	yes, reduced rates for CFIB members	528	focus on post-sec graduates	Component of a Canadian network
britishcolumbiajobs.com	VentureLabour.com Inc.	none	yes	81		part of the Canjobs network, Canadian-only recruitment
bcjobs.net		none	reduced rates for BC business magazine subscribers	399	focus on bc jobs, all sectors	B.C. focussed
bcjobs.com	Damingo.com Technology Inc.	none	free during startup	71	rudimentary functions for job seekers	
hotjobs.com	linked to Yahoo	none	yes	366		component of an international network
T-net (bctechnology.com)	BC Technology Industry Association	none	yes	433	high-tech sector	BC focussed
Tourism Work Web					Tourism sector	Developed and maintained by the Candian Tourism Human Resource Council
Nurses@work					nurses	National scope
Construction Job Centre	Vancouver Regional Construction Assoc.				construction	will be B.C. in scope
Apply to Teach Network	developed by Centre for Education and Training and Industry Canada	registration fee	none for public schools		teachers	National scope